Revised

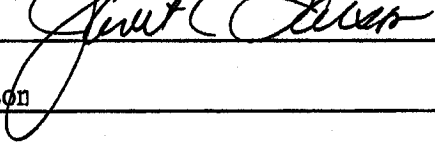# LIBRARY OF CALIFORNIA
2001/02 PLAN OF SERVICE

Regional Library Network: Sierra Valley Library Network

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Authorized signature: _Janet E. Larson_

Name: Janet Larson Date: 6/22/01

Title: Chairperson, Sierra Valley Library Network

Submit in 5 copies, 1 with original signature, by 4:30 p.m., ~~Monday, April 2, 2001~~ to:

Mailing
Library of California - Plan of Service
California State Library – LDS
P.O. Box 942837
Sacramento, CA 94237

Shipping/Delivery
Library of California - Plan of Service
California State Library - LDS
900 N Street, Room 500
Sacramento, CA 9581
(916) 653-5217

Regional Library Network: ___Sierra Valley Library Network___

Program element:

18841. (Administration)

(a) Each regional library network shall **establish a regional library council.** Duties of the regional network council include overall administrative responsibility for the network, adopting an annual plan of service, assuring the appropriate expenditure of funds, and submitting annual budget.

(b) Each regional network council shall **elect from its membership a representative board** to carry out its policies.

(c) Administration and management of the regional library network shall **provide the vision and leadership necessary to perform the functions and deliver the services** in a timely and satisfactory manner.

Describe in narrative form how the Regional Library Network will implement section 18841 (a), (b) and (c) including the following elements (use as many pages as necessary):

1. Program Description

    Formation of the Regional Library Council and Board of Directors. The Library of California Board formally approved Sierra Valley Library Network to proceed with operations at the November 11, 2000 Board meeting. The Regional Library Council of the Sierra Valley Library Network had its first meeting on February 20, 2001 at which time an interim Board of Directors was appointed by the Incorporator (see Attachment A- agenda and minutes). Subsequently the SVLN Regional Library Council held its first Annual Meeting on March 22, 2001, and a Board of Directors was elected according to the Bylaws of the Sierra Valley Library Network, a California Nonprofit Public Benefit Corporation and a Library of California Regional Library Network (see Attachment B – agenda).

    Administration and management of the regional library network:

    Develop network committee and sub-regional interest groups; administrative support will facilitate meetings of the Regional Library Council, the Board of Directors, and committees formed by the Regional Library Council or Board of Directors; assess the interest in and need for sub-regional interest groups, and arrange meetings as needed, including these following areas:

    - Membership
    - Marketing / Public Awareness
    - Strategic Long-Range Planning
    - Bylaws & Structure
    - Finance / Budgeting

    - Service Program Planning
    - Automation
    - Interlibrary Loan / Serials
    - Reference
    - Children's Services / Youth Services

    Member recruitment; formation of a membership committee to disseminate information about SVLN to potential members; continual updated list of potential members; receive / review member applications; track / follow up on applications; submit to LoC Board annually.

Development of policies and protocols; begin process of studying and recommending policies/ protocols for Regional Resource Centers, and for Other Than Library Information Providers; develop process of studying and recommending policies/protocols for other program elements (*see also* Plan of Service Program Elements: Telecommunications Infrastructure, Regional Delivery, Training & Continuing Education, Information & Referrals and Public Awareness); form a network task force to examine needs and make recommendations in the areas of preservation, conservation and disaster preparedness; monitor state-level developments and coordinate network policies and protocols with state level activities.

Consortium pricing; establish appropriate service committee(s) to study and make recommendations concerning network brokering of consortium pricing for electronic databases (*see also* Plan of Service, Program Element: Telecommunications Infrastructure), for books and other library materials, and for general supplies.

CLSA Transition; contract with consultant to study all issues involved in integrating MVLS and 49/99 with SVLN, including organization, staffing, service provision, legal matters, and finances; monitor state-level developments and assist in information gathering and documentation of service and funding needs and impacts on the public; and make recommendations to the CLSA Transition Committee and to the MVLS and 49-99/CAL administrative councils.

2. Service Delivery Standard(s)/Measures

Standard:	Membership recruitment (see Public Awareness)

Standard: By February 2002, the Board of Directors will develop a financial plan for ongoing operations, including cost of core services and membership support of other services.
Measure: Plan by February 2002.

Standard: By March 2002, the Board of Directors will submit a revised long-range plan of service and an Annual Plan for adoption by membership Council.
Measure: Adoption of plan.

Standard: By December 2001, committees will be formed with representatives from all types of libraries and have a meeting.
Measure: All committees will form and have agendized meetings by December 2001.

Standard: The Executive Director and Chief Financial Officer will prepare all reports, audits, agendas, minutes, etc. on time.
Measures: Accurate, timely reports, minutes, etc.

3. Evaluation
    a. Review by Council and Board of Directors

4. Budget, using the following categories:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	$90,000[1]	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	-0-	-0-	-0-	-0-
6. Total	90,000	-0-	-0-	-0-

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[1] Includes contractual agreements with MVLS and/or 49-99/CAL for administrative support; and for CLSA transition consultant.

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

YES

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC
1. Personnel	$99,000
2. Operations	106,000
3. Materials	-0-
4. Equipment	-0-
6. Total	189,000

Regional Library Network: <u>Sierra Valley Library Network</u>

Program element:

18842. (Telecommunications Infrastructure)

Each regional library network shall do all of the following:

(a) **Make available a telecommunications system** for the transfer of information and communications among its members.

(b) **Provide regional communications** based upon the most effective methods of exchanging information among its members.

(d) **Provide online access to the information files, resources, and bibliographic records** of its members, which may be accessed regionally and statewide.

Describe in narrative form how the Regional Library Network will implement section 18842 (a), (b) and (d) including the following elements (use as many pages as necessary):

1. Program Description

> <u>Regional Web site</u>; maintain and enhance network Web site; add links to network member Web sites as they are developed and membership expands.

> <u>Regional listserv</u>; maintain and enhance network listserv to share all relevant information; add subscribers to the listserv as it is developed and membership expands.

> <u>Audio and videoconferencing</u>; arrange for conference calls for Regional Library Network Council, Board of Directors, committees, and other network groups as needed; inventory videoconferencing equipment available to network members; study options for using videoconferencing to facilitate regional communications, especially with geographically isolated members; use videoconferencing to deliver orientation to remote sites.

> <u>Automation/Technology</u>; contract with consultant(s) to continue regional technology planning; develop automation standards for new network members; explore and develop options for upgrading, expanding, and linking the two existing virtual catalogs (MVLS and 49/99); establish links to new network members with Z39.50 software; provide technical assistance (onsite and remote) to network members; form service committees as identified (*see also* Plan of Service, Program Element: Administration)

> <u>Technology inventory</u>; continue to expand technology inventory to new network members; identify libraries that need assistance with telecommunications equipment and/or Internet connectivity; within available resources and funding, provide funding for one-time costs such as small equipment and telecommunications installations.

Provide electronic database licensing options to network members; assess long-term options and costs for electronic databases; study and make recommendations concerning network brokering of consortium pricing for electronic databases form service committees as identified (*see also* Plan of Service, Program Element: Administration).

2. Service Delivery Standard(s)/Measures

Standard: SVLN website is up-to-date and the website is available to members.
Measure: On annual survey, members have an 80% satisfaction rate with website.

Standard: Members will have access to electronic and bibliographic records of other members.
Measure: Members will continue to be connected via Z39.50 to DRA catalog as their technical capabilities permit.

Standard: Members will be able to attend meetings and training via telecommunication.
Measure: 80% of all committee meetings will be available via telecommunication.

3. Evaluation
- Council & Board progress assessments
- automation committee(s) oversight

4. Budget, using the following categories:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	90,000[2]	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	10,000	-0-	-0-	-0-
6. Total	100,000	-0-	-0-	-0-

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

YES

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC
1. Personnel	106,000
2. Operations	417,000
3. Materials	-0-
4. Equipment	63,000
6. Total	586,000

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[2] Includes contractual agreements with MVLS and/or 49-99/CAL for administrative support; for technology coordinator; and for other services as needed to meet the above service plan.

LIBRARY OF CALIFORNIA NETWORK PLAN OF SERVICE

Regional Library Network: __Sierra Valley Library Network__

Program element:

18842. (Regional Delivery)

Each regional library network shall do all of the following:

(c) Provide intraregional delivery service based upon the most cost-effective methods for
moving materials among its members.

Describe in narrative form how the Regional Library Network will implement section 18841 (c), including the
following elements (use as many pages as necessary):

1. Program Description

    Delivery; contract with consultant to study and make recommendations regarding delivery options to all
    network members; survey member institutions regarding needs for frequency of delivery; within
    available resources and funding, extend delivery to new network members; document delivery
    workload and make adjustments as needed

2. Service Delivery Standard(s)/Measures

    Standard: SVLN will deliver materials on a frequency based on the identified needs of the member
    library users, using the most cost-effective means available, with a delivery at least once a
    week.

    Measures: Number of
    *   items shipped/delivered
    *   number of stops/pickups per week
    *   business days elapsed between placement of item in shipment and delivery to member
        library

3. Evaluation
    *   member satisfaction survey
    *   Council & Board cost/benefit assessment
    *   statistics

4. Budget, using the following categories:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	112,125 delivery[3] + 10,550[4]	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	-0-	-0-	-0-	-0-
6. Total	$122,675	-0-	-0-	-0-

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

    YES

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC
1. Personnel	77,000
2. Operations	20,000
3. Materials	-0-
4. Equipment	-0-
6. Total	97,000

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[3] Anticipated initial delivery service provided via contractual agreements with MVLS and/or 49-99/CAL. Estimates based on current cost of delivery per stop for 49-99/CAL member libraries.

[4] Includes contractual agreements with MVLS and/or 49-99/CAL for administrative support, and for delivery consultant.

LIBRARY OF CALIFORNIA NETWORK PLAN OF SERVICE

Regional Library Network: __Sierra Valley Library Network__

Program element:

18845. (Training and Continuing Education)

Each regional library network shall **provide opportunities for training and continuing education activities** that encourage the most effective use of the resources and services authorized under this chapter, and that respond to the needs of its members in the effective delivery of services.

Describe in narrative form how the Regional Library Network will implement section 18845, including the following elements (use as many pages as necessary):

1. Program Description

> Reference training; conduct reference training needs assessment of network members; provide training in the use of electronic database search techniques; provide orientation and training in basic reference referral to new network members; develop & provide reference training in response to needs identified in the needs assessment.

> Technology training; conduct technology training needs assessment of network members; provide training in the following areas, already identified in the LOC grant for "Staying Connected": use and operation of the DRA Web2 virtual catalogs, Z39.50 software, basic PC troubleshooting; and uniform cataloging in the assignment of MARC tags, use of indexed fields, and use of thesaurus controlled fields; provide additional technology training in response to needs identified in the technology training needs assessment.

> Other training; develop & provide a general orientation training for new network members; deliver network orientation training to sub-regional, geographically proximate groups; develop and deliver training in interlibrary loan procedures; develop and deliver training in reference referral procedures; develop and deliver training in direct loan/onsite service/ patron referral procedures; assess training needs in the area of Children's Services; assess training needs in the area of Youth Services; monitor state-level developments and take advantage of statewide training programs

2. Service Delivery Standard(s)/Measures

> **Standard:** Training opportunities will be posted on the website on a monthly calendar.
> Measures: Number of monthly training opportunities posted.

> **Standard:** New members will attend an orientation session
> Measures: Number of participants and participating libraries

> **Standard:** Reference training:
> - Provide training session in the use of electronic database search techniques (1 session)
> - Provide orientation and training in reference referral within SVLN (1 session)
> **Standard:** Technology training (based on areas identified in the LoC grant for "Staying Connected"):
> - Use of the DRA Web2 virtual catalogs (1 session)
> - Z39.50 software (1 session)
> - Basic PC troubleshooting (1 session)
> - Uniform cataloging in the assignment of MARC tags; use of indexed fields; use of thesaurus controlled fields (1 session)

2. Service Delivery Standard(s)/Measures (cont'd)

Standard: <u>ILL training</u>
- Interlibrary loan procedures within SVLN when established (1 session)
- <u>Direct loan/onsite service/patron referral procedures</u> within SVLN when established (1 session)

Measures: Number of participants
Number of participating libraries
Number of locations

Standard: 80% of participants rate training "good" or "excellent"
Measure: Number of participants rating training in "good" or "excellent" category

Note: *Some training will be offered for a fee.*

3. Evaluation
- Council & Board assessment relative to results of needs assessments
- Member and participant satisfaction surveys
- Training committee oversight
- sample pre- and post-test attainments

4. Budget, using the following categories:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	65,000[5]	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	-0-	-0-	-0-	-0-
6. Total	65,000	-0-	-0-	-0-

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

YES

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC
1. Personnel	67,000
2. Operations	65,500
3. Materials	-0-
4. Equipment	-0-
6. Total	132,500

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[5] Includes contractual agreements with MVLS and/or 49-99/CAL for administrative support; and for training as identified.

Regional Library Network: __Sierra Valley Library Network__

Program element:

18846. (Information and Referrals)

(a) Each regional library network shall **provide information and referrals to answer requests that are beyond the capacity or capability of its members** by accessing the resources and expertise of other libraries, improving general reference service in participating libraries, and improving reference service to respond to the needs of the underserved populations in the region.

Describe in narrative form how the Regional Library Network will implement section 18846, including the following elements (use as many pages as necessary):

1. Program Description

> Reference and information provision; contract with consultant to study options and make
> > recommendations for network reference and information services; form network Reference Committee *(see also* Plan of Service, Program Element: Administration); develop recommendations for policies/procedures for reference and information referral within the network; within available resources and funding, extend reference and information referral services to new network members; identify special collection strengths within the network, and share that information with network members; form a Regional Resource Centers Group to monitor state-level developments, to study and make recommendations to the SVLN Council and/or Board of Directors concerning the criteria, roles, and functions of regional resource centers; identify other than library information providers within the network region, and disseminate information about the network to them and about them to the network.

> Interlibrary loan; begin move toward staff-mediated automated interlibrary loan; form network
> > Interlibrary Loan Committee *(see also* Plan of Service, Program Element: Administration); develop recommendations for policies/procedures for interlibrary loan within the network; within available resources and funding, extend interlibrary loan service to new network members; develop and provide training in interlibrary loan policies/procedures *(see also* Plan of Service, Program Element: Training and Continuing Education); begin planning for patron-initiated, "staff-less" automated interlibrary lending; monitor state-level developments and projects, and participate in/coordinate with them if possible; provide information to network members about state-level initiatives and about interlibrary loan in general; contract with consultant to study options and make recommendations regarding expansion of the 49-99/CAL serials union list to include network members;

> Direct loan/Onsite Services/Patron Referral; monitor state-level developments and projects, and
> > participate in/coordinate with them if possible; provide information to network members about state-level initiatives and about direct loan in general; develop and provide training in direct loan/onsite service and patron referral policies/procedures *(see also* Plan of Service, Program Element: Training and Continuing Education)

Development of policies and protocols; begin process of studying and recommending policies/protocols for Regional Resource Centers (*see also* Plan of Service Program Element: Administration); begin process of studying and recommending policies/ protocols for Other Than Library Information Providers (*see also* Plan of Service Program Element: Administration); monitor state-level developments and coordinate network policies and protocols with state level activities; Reference Committee will begin process of studying and making recommendations regarding reference referral policies; Interlibrary Loan Committee will begin process of studying and making recommendations regarding interlibrary loan policies; Direct Loan/Patron Referral Committee will begin process of studying and making recommendations regarding interlibrary loan policies; study and make recommendations regarding future summer reading programs within the network; monitor and support state-level initiatives in the area of Youth Services.

2. Service Delivery Standard(s)/Measures

Standard: 70% of questions will be responded to within 10 working days
90% of questions will be answered "completely," "almost completely" or "no answer possible" on evaluation formed completed by the submitting librarian and the library user.
Measure: Annual report will be prepared by library, by type of library, and in total for questions received and responses.

3. Evaluation
- Council & Board progress assessment
- Member satisfaction survey
- Reference & ILL committees joint oversight

4. Budget, using the following categories:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	65,000[6]	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	-0-	-0-	-0-	-0-
6. Total	65,000	-0-	-0-	-0-

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

YES

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC
1. Personnel	89,500
2. Operations	25,000
3. Materials	515,000
4. Equipment	-0-
6. Total	629,500

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[6] Includes contractual agreements with MVLS and/or 49-99/CAL for administrative and reference support; and for reference delivery consultant.

LIBRARY OF CALIFORNIA NETWORK PLAN OF SERVICE

Regional Library Network: __Sierra Valley Library Network__

Program element:

18847. (Public Awareness)

Each regional library network shall **augment the public awareness programs of its members** by providing public relations packages to them for customization and dissemination.

Describe in narrative form how the Regional Library Network will implement section 18847, including the following elements (use as many pages as necessary):

1. Program Description

> Public Awareness program: form marketing committee; hire consultant to assist with public relations/public awareness; develop new SVLN brochure; develop informational materials for libraries and the general public

2. Service Delivery Standard(s)/Measures

Standard:	Public Awareness Committee will recruit new members from October 1, 2001 through February 1, 2002.
Measures:	At least one third of the eligible potential members will be contacted.
Standard:	SVLN will have a corporate image with standards for use and an information/promotion package by September 2001.
Measures:	Package available for distribution by September 15.

3. Evaluation
   - marketing/public awareness committee oversight
   - Council & Board progress assessment

4. Budget, using the following categories:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	10,000[7]	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	-0-	-0-	-0-	-0-
6. Total	10,000	-0-	-0-	-0-

5. Describe whether this budget supports services and funding for all additional members and participating libraries that the region is submitting for approval at the Board's April meeting for membership beginning July 1, 2001.

YES

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[7] Includes contractual agreements with MVLS and/or 49-99/CAL for administrative support, and for public awareness consultant.

6. *(Optional)* Estimate the total amount of LoC funds needed to completely implement this service component to all regional members as of July 1, 2001.

Category	LoC
1. Personnel	6,000
2. Operations	30,000
3. Materials	-0-
4. Equipment	-0-
6. Total	36,000

LIBRARY OF CALIFORNIA NETWORK PLAN OF SERVICE

Regional Library Network: Sierra Valley Library Network

SUMMARY PAGE

1. Consolidated budget. Please summarize all program budgets in this final table:

Category	LoC	CLSA	LSTA	Other
1. Personnel	-0-	-0-	-0-	-0-
2. Operations	452,675	-0-	-0-	-0-
3. Materials	-0-	-0-	-0-	-0-
4. Equipment	-0-	-0-	-0-	-0-
6. Total	90,000 100,000 122,675 65,000 65,000 <u>10,000</u> **452,675**	**-0-**	**-0-**	**-0-**

3. Anticipated membership 2002/03

Attachment A is a table reflecting Library of California Memberships approved by the Library of California Board at its February 2001. For the purpose of planning, please estimate the number of members and participating libraries in your regional network for the *2002/03 fiscal year*, including the numbers indicated in *Attachment A*.

Library Type	Number Projected (2002/2003)
Academic Library Members	14
Participating libraries	20
Public Library Members	21
Participating libraries	134
School District/Independent Members	22
Participating libraries	52
Special Libraries Members	23
Participating libraries	25
Total Members	**80**
Total Participating	**231**

3. Resource sharing support.
    If possible, please provide an estimate of how much the network budget that supports the 2001/02 Plan can be said, in the broadest sense, "to reimburse libraries to share their materials with each other," and define which programs and services that dollar figure reflects.

    Not Possible